Human Resource Management System

Workday Job Aid
Workday Overview

This Job Aid provides an overview of the Workday system, describes the New Release process and some tips and tricks to help you.

- 🔵 Employees
- ⚪ People Managers
- ⚪ Human Resources

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1. Introduction

Workday is a cloud-based software offering human resources and financial management solutions. Suffolk County is implementing Workday's HR module.

Workday HR supports functions such as HR management, employee benefits, talent management, recruiting, payroll solutions, time tracking, workforce planning and analytics, and learning. It simplifies employee experience, empowers managers to lead teams better, and enables HR to focus on strategic decisions and moments that matter the most.

In this job aid, you will learn how to log in to Workday, navigate the home page, and access your Workday Inbox.

Need more help? Contact us via email at HRMShelpline@suffolkcountyny.gov.

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2. Overview for Employees

Welcome to Workday for employees. As a County employee, you can view your information in Workday and perform many self-service tasks. Workday allows for easy time tracking; updating of personal information; reviewing compensation, benefits, and more!

The Workday Home page includes the following key areas (See Figure – 1 on next page):

- [1]Home: Workday icon in the upper left corner. It allows you to return to the Home page from anywhere within Workday.
- [2]Search: This allows you to find tasks, reports, and people within your organization. It also allows you to narrow results by categories, such as Common, Organizations, and All of Workday.
- [3]Quick Access: This icon lists your most used applications as well as a personalized set of Shortcuts to Workday tasks or a link to relevant documentation.
- [4]Workday Assistant: Workday's Artificial Intelligence Chatbot. A self-service tool to help answer your Workday-related questions. To learn what information the assistant can provide type Help and then click on Show All Capabilities.
- [5]Notifications: Bell-shaped icon that displays the number of new notifications that require your attention.
- [6]Inbox: Paper tray icon that displays the number of action items pending. Inbox items are outstanding tasks that must be completed. Your inbox also contains an archive of items already processed.
  - o **Note:** The Workday Inbox is different from your County email Inbox.
- [7]View Profile: Icon in the upper right corner. It will either be displayed as a silhouette (if no picture has been uploaded) or your picture. This feature displays your worker profile. Profile information includes details such as contact information, job history, and compensation.
- [8]Awaiting Your Action: Recent tasks added to your Inbox will show up here.
- [9]View All Apps: Click this link to view all applications made available to you. They provide quick access to different areas of your employee profile. Click the designated application to view more options related to that area. To add applications to this area click on the gear-shaped icon.
- [10]Timely Suggestions: Gentle reminders of tasks that need your attention.
- [11]Announcements: Important messages from the County.
- [12]Recommended for You: Suggested reading material based on your role.

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Figure - 1

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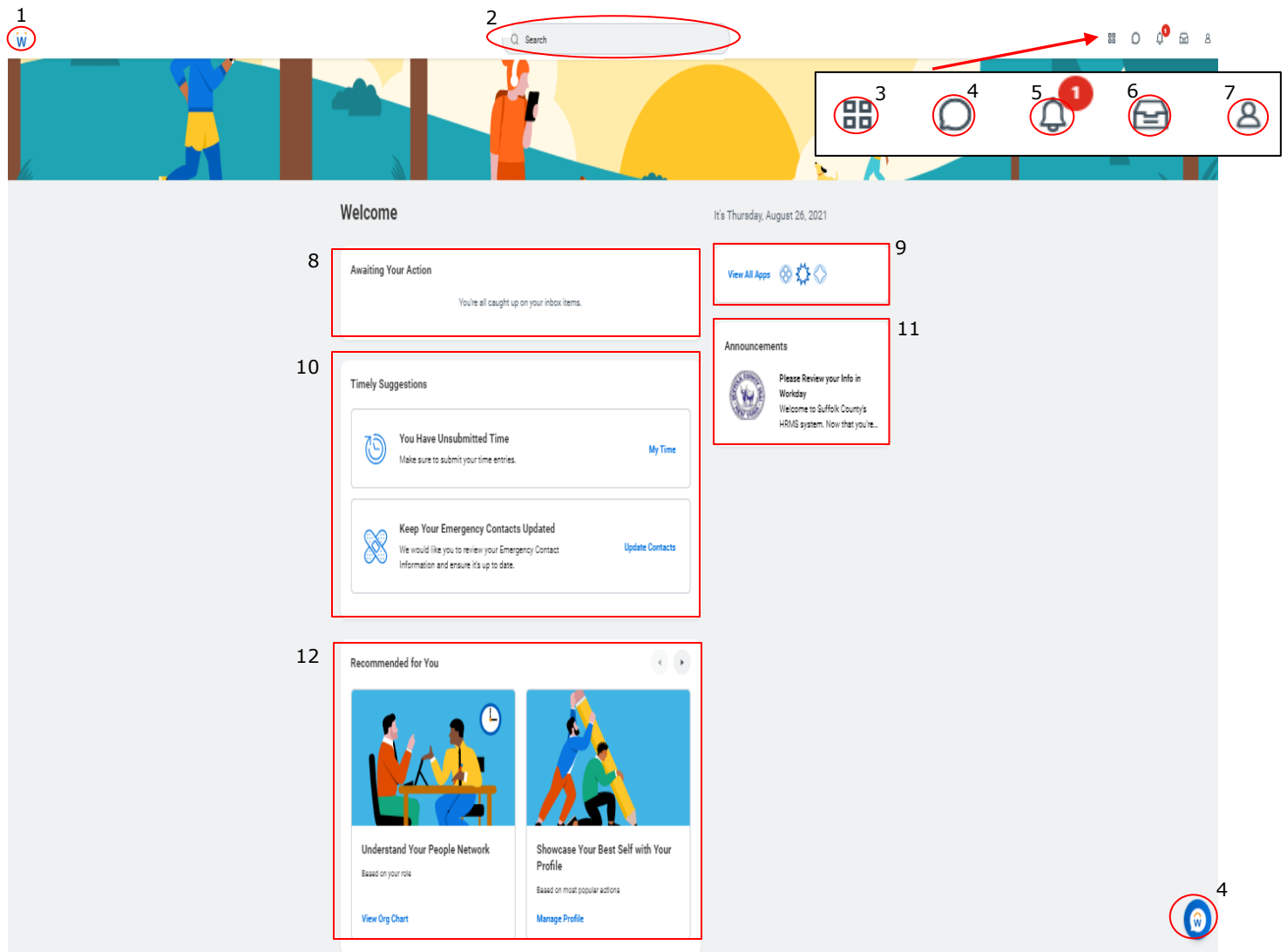
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On the Workday homepage, you will find a section labeled **View All Apps (9)**. Here is where you will find access to many of the Workday tools. Click the appropriate application to view the options related to it. Some of the key applications are:

- Learning: Includes actions and views related to training courses that are available to you.

- Talent and Performance: Includes actions and views related to your career, such as view your certifications, education, job history, and awards.

- Time: Includes actions and views related to entering the time that you work.

- Absence: Includes actions and views related to the time you have taken or plan to take off (i.e. Vacation, Personal, Sick, FMLA, Military Leave, etc).

- Benefits: Includes actions and views related to benefits, such as change benefits, beneficiaries, and dependents.

- Pay: Includes actions and views related to your pay such as withholding elections, payslips, and timesheets.

  - **Note:** Depending on your position, you may or may not be able to access certain applications.

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3. Overview for People Managers

A manager in Workday is defined as a person with one or more direct reports. Employees logged into Workday with the role of manager or supervisor will have additional security access, applications, and business processes compared to those with the role of employee. These differences will give managers or supervisors access to information about their direct reports, such as the ability to view employee job details; review and approve timesheets and time-off requests; and view their team's time-off calendar, leave balances, etc.

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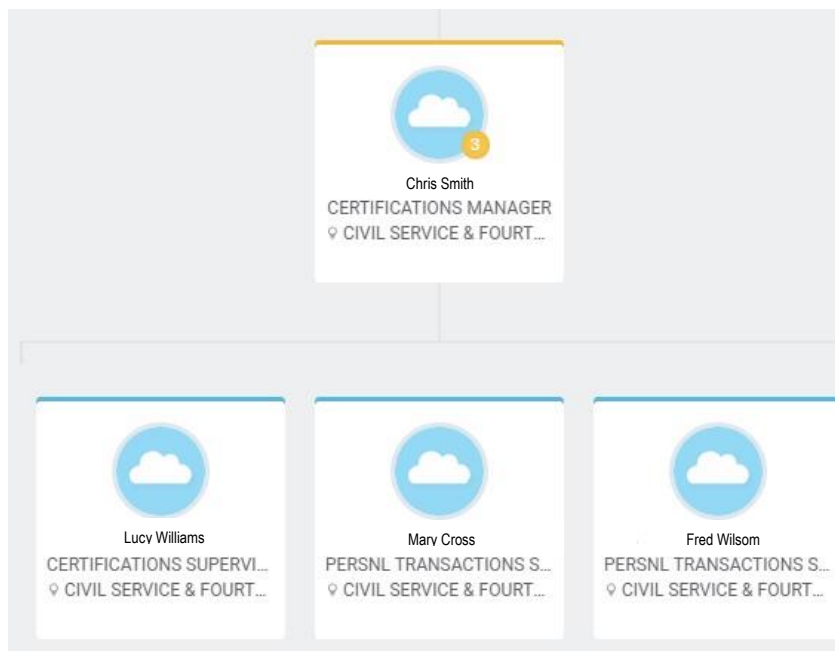
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4. Overview for HR

Members of the HR team here at the County are afforded varying degrees of access depending on their specific role within the Human Resources department. Some of the functions of the HR role in Workday are:

- Recruitment/Onboarding

- Staffing

- Time Off Management

- Benefits

- Payroll

- Performance Management

- Training

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5. New Workday Software Releases

With any software, product improvements are provided through what is referred to as a "release".

- Workday schedules two such releases annually. The first release occurs in March and the second in September.

- With each release, a list of changes to the system is provided with details describing each item. The County will review that list, prioritize the features, and develop a plan to review/test each item. Under certain conditions, the County may decide not to leverage a portion of the newly delivered functionality as it may adversely impact its operations.

- To keep all interested parties in the know a series of communications will be sent out making everyone aware of the release, what it consists of, and what the plan to review and implement it is.

- Several weeks before the production release a copy of our Workday Environment will be created and updated with the new software. This new copy is referred to as the "preview tenant". This environment is used to familiarize oneself with the new functionality that the software release brings as well as provide an area to test existing functionality and integrations. Key members within the County will be called upon to represent their area and review the updated release of Workday to ensure that the release does not adversely impact the County's use of the Workday system or any of the systems that integrate with it.

- While the review of the new release takes place, the impacted job aides will also be updated to reflect the new release. If it is deemed necessary, specific training webinars will be developed to cover in detail any of the newly delivered functionality.

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6. Tips and Tricks

Workday is a large system that provides a great deal of functionality for many throughout the County. At first blush, it may seem a bit overwhelming, but over time, efficiencies are gained as working with the tool becomes more intuitive. To help jumpstart that comfort level several steps have been taken.

- Job Aids have been written to provide step-by-step instructions on how to accomplish many of the tasks within Workday.

- If the Job Aids do not resolve your issue, please contact your Payroll Rep. If you still have questions that cannot be answered either from a Job Aid or your Payroll Rep, please enter a SuffolkNOW ticket, but only after you have checked the job aids and contacted your Payroll Rep for assistance.

- Periodically, tips and tricks will be sent out via email to provide little-known facts about how to use Workday effectively. Here are two examples:

  - Use search shortcuts: Type a question mark in the search box and then press "Enter" on your keyboard. You'll see a list of search shortcuts you can use to narrow down your search results.

  - You can upload your profile picture using the "Change My Photo" task.

- There is also a Workday - Frequently Asked Question (FAQ) section on the HRMS website where common questions are listed and answered.

- Workday has added Artificial Intelligence technology to its application. This functionality extends the self-service approach that Workday employs. The feature is known as **Workday Assistant**, and it enables users to ask questions or type in phrases explaining what they would like to accomplish within Workday. The Workday Assistant will either provide the information requested or the steps needed to perform the requested task.

  Note: Depending on the employee's security access within Workday or the built-in capabilities of the Workday Assistant itself, some requests will not be able to be addressed.

Welcome to Workday. Have a great workday!

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Change Log				
Revision Number	**Date of Change**	**Affected Lesson**	**Action**	**Initials**
1.1.1.1	09/15/2021		Log Created	RK
1.1.1.2	11/1/2021	Tips and Tricks	Updated Support Bullet	RK

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